

Example Worksheet 1: Setting Goals

Short Term Goals			
Goal	Amount Needed	Monthly Contribution	Deadline

Medium Term Goals			
Goal	Amount Needed	Monthly Contribution	Deadline

Long Term Goals			
Goal	Amount Needed	Monthly Contribution	Deadline

** Breaking big long term goals into shorter ones will make them seem more attainable. For example, rather than putting down that you will buy a new home, break the goal down into what you would need to make the initial down payment.*